

IRS Paid Preparer Tax Identification Number (PTIN) Application and Renewal

▶ Information about Form W-12 and its separate instructions is available at www.irs.gov/w12.

1 Name and PTIN (Print in ink or Type)	First name	Middle name	Last name
	<input type="checkbox"/> Initial application <input type="checkbox"/> Renewal application (Enter PTIN: P)		
2 Personal Mailing Address and Phone Number	Street address. Use a P.O. box number only if the post office does not deliver mail to your street address.		
	City or town, state/province, and, if outside U.S., country. Include ZIP or postal code where appropriate. Do not abbreviate name of country.		
	Phone Number () -		
3 SSN and Date of Birth	SSN - -	Date of birth (month, day, year) / /	
4 Email Address	Enter the email address that should be used to contact you.		
5 Past Felony Convictions	Have you been convicted of a felony in the past 10 years? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	If "Yes," list the date and the type of felony conviction(s) and explain why the Internal Revenue Service should consider you suitable to practice.		
6 Federal Tax Compliance	Are you current on both your individual and business federal taxes, including any corporate and employment tax obligations? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	If you have never filed a U.S. individual income tax return because you are not required to do so, check the "Yes" box.		
	If "No," provide an explanation.		

7 Professional Credentials	<p>Check all that apply. Enter state abbreviation and appropriate number(s):</p> <p><input type="checkbox"/> Attorney - Licensed in which state(s): _____ Number(s): _____ Expiration Date(s): _____</p> <p><input type="checkbox"/> Certified Public Accountant (CPA) - Licensed in which state(s): _____ Number(s): _____ Expiration Date(s): _____</p> <p><input type="checkbox"/> Enrolled Agent (EA) _____ Number(s): _____ Expiration Date(s): _____</p> <p><input type="checkbox"/> Enrolled Actuary _____ Number(s): _____ Expiration Date(s): _____</p> <p><input type="checkbox"/> Enrolled Retirement Plan Agent (ERPA) _____ Number(s): _____ Expiration Date(s): _____</p> <p><input type="checkbox"/> State Regulated Tax Preparer-State(s): _____ Number(s): _____ Expiration Date(s): _____</p> <p><input type="checkbox"/> Certified Acceptance Agent _____</p> <p><input type="checkbox"/> None</p>
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Skip lines 8, 9, and 10 if you are an attorney, CPA, or EA.

8 Form 1040 Preparation	<p>Do you prepare Form 1040 series tax returns (or accompanying schedules) for compensation? (If you ONLY prepare Form 1040-PR or Form 1040-SS for residents of Puerto Rico, check "No.") <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
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9 Supervised Preparer Determination	<p>Are you employed by an attorney or CPA firm, or other recognized firm at least 80 percent owned by attorneys, CPAs, or Enrolled Agents? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Are you supervised by an attorney, CPA, EA, ERPA, or Enrolled Actuary? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does an attorney, CPA, EA, ERPA, or Enrolled Actuary sign all of the tax returns that you prepare? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you checked "Yes" to all of these questions, you are a supervised preparer and must enter your supervisor's PTIN: P</p>
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10 Reserved	Reserved
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11 Business Identification Numbers	<p>Are you self-employed or an owner, partner, or officer of a tax preparation business? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you check "Yes," complete this line. If you check "No," go to line 12.</p> <table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:33%; border-bottom: 1px solid black;">Your CAF Number</td> <td style="width:33%; border-bottom: 1px solid black;">EIN</td> <td style="width:33%; border-bottom: 1px solid black;">EFIN</td> </tr> </table>	Your CAF Number	EIN	EFIN
Your CAF Number	EIN	EFIN		

12 Business Mailing Address	<p>Business address</p> <hr/> <p>Business city or town, state/province, and, if outside U.S., country. Include ZIP or postal code where appropriate. Do not abbreviate name of country.</p>
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